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ABSTRACT

Long range planning allows an indepth analysis, to be updated yearly, of a school to determine the directions in which it needs to start moving based on the assumptions about the present and future success of the school. There is no quick fix or outside consultant that can remedy or plan for any individual school; only those intimately involved with the school can accomplish the planning. The involved participants should include the principal, the clergy, parents, students, parishioners, and the larger community. Seven components must be considered: (1) the philosophy of the school; (2) the enrollment and future demographics; (3) the current staffing patterns and ways to provide an increased professionalism for them; (4) the curriculum; (5) physical facility needs; (6) finances; and (7) the particular school goals. (LMS)

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PRACTICAL STEPS FOR LONG RANGE PLANNING

FOR ELEMENTARY SCHOOLS

My emphasis today is Practical. If each of you takes home one solid idea that helps your situation, our time together will be worth it.

What is Long Range Planning? Simply put, it is a way of saying, "Will I be around in ten years, and, if so, what will I have become"? Long Range Planning helps us make the changes now that can change the direction or course that we are heading on.

It forces us to give a total look at our school. It's an indepth analysis of all that we are about. Knowing where we are right now and deciding where we want to be in the future is the main benefit of long range planning. When we know what we want to be we can make the changes now to guarantee that reality.

The long range plan is two different things:

1. It is a document revised yearly to give direction to your school.

2. Most importantly, it is a way of acting based on assumptions about the present and future success of your school.

Some warnings - Long range planning does not work if you go for the "Quick Fix". The process takes lots of people and lots of time. Hiring a development director to go out and make you money does not do the trick. Waiting for the government to bail you out won't work either. No, long range planning has to be done by the people who are at the school with a knowledge of the present and a vision of the future.

Who should be involved in Long Range Planning?

1. The principal, faculty, and staff must work together. The whole group must brainstorm and discuss precisely what it is you want the school to be.

2. The clergy - the pastor must be an ally in the process.

Tips: 1. Sunday collection inventory - In an analysis made from a parish with 1300 families - 28% of all funds came from 230 families.

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2. Leadership roles - 95% of the leaders were school parents. When the pastor sees the school as an asset you are on the way.

3. School Parents - They have a tremendous stake in the school. Use their expertise as much as you can. Put them in leadership positions to help determine the school's future.

If you do not have a School Board - make that your first priority. A good board will really help you succeed with a solid long range plan.

4. The Students - they can tell you what makes a good school and what would improve it. e.g. school yard equipment, more computers, brighter classrooms.

5. The Parishioners - many went to your school or they know somebody that did. What is their vision for your place.

6. The larger community - How do you fit into the community? What is the community's impression of your school?

We briefly discussed what the plan is and who should play a part in it. Let's look at the major components of a good long range plan:

The major components are 7:

1. Philosophy
2. Enrollment
3. Staffing
4. Curriculum
5. Plant Needs
6. Finances
7. Particular School Goals

1. <u>Philosophy</u> - What are we about?

Not some 20 page item we put in an accreditation report- we need to succinctly and clearly state what we are about.

I'll read a brief philosophy that I've used in the past. (St. Joseph's Philosophy) - "We concur with the Philosophy Statement of the Diocese of Oakland. In addition, we

believe St. Joseph exists for one reason - the total education of each student. Each student must receive each day an increase in his spiritual, academic and physical and social development This total growth can only be achieved by full participation of the student's parent, family, teachers, clergy and classmates. Each student is unique with unique needs and concerns.

We will strive constantly to provide an environment at St. Joseph's in which each boy and girl receives our best efforts. At the same time, we will encourage the student's best efforts". That short philosophy forces a trememdous committment from <u>all</u> members of the school community".

Frankly, the written part is easy here. We put our heads together and come up with a philosophy we can work with.

It's the acting part that sometimes is the toughest. Several years ago I took over a school that was run down, heavily subsidized (over $115,000), the population was down to 265 children with the places available for 340. With everything falling apart where do you start? The finances? The enrollment? - No, quite simply - the Bathrooms! That is right - we scrubbed the pipes, painted the bathrooms, fixed the plumbing - it sent a message to the kids that we're still at the school. We have pride in this place - we're fixing it because this school is staying around a long time - we will do all in our power to make this place right for you.

Briefly then, for Philosophy, find an area that needs the most attention and address that need. When your community sees the philosophy as a "reality" they will get behind you.

2. <u>Enrollment</u>

a. Analyze the local public school district's population (there has been a recent upsurge in the elementary population).

b. Analyze the Baptism rate at your parish.

c. Check with the Census Bureau, the Chamber of Commerce, local realtors, the Phone Company.

d. Drive through the neighborhood. Look around - is this becoming an older community, young professionals, recent immigrants - you can learn a great deal by just driving around.

How do you fit into the community you are serving. For example, has the community had a large influx of Asian immigrants and has your school considered ways to attract the new group to your doors?

For action:

1. Public Relations:

Get into the newspapers, on radio, and T.V.

You need a "hook" for big exposure:

For instance in 1981 I threw an old fashion tailgate party in honor of the San Francisco 49ers. Over 600 people attended the party. We received newspaper and television coverage.

Last year I received front page coverage in the paper because of the Harley Davidson motorcycle I ride to school.

So, think carefully - what is the "hook" you need to get your school in the media?

Besides, "hooks" do a lot of Faires - Art, Science, Speech Contests, Spelling Bees - things that involve kids performing or showing their work. Schedule these functions or displays at appropriate times to draw the largest audience as possible (e.g. Sunday after Masses - great time for a Science Display).

2. The Principal

Know the leaders of your community - the mayor, police chief, fire chief, public school officials - they need to know and hear your story - there are tremendous benefits.

3. Staffing

Document - publish the degrees and credentials of each of your faculty member.

- publish their academic accomplishments- seminars, published articles, etc. (these always impress parents).

That part is simple - the action part takes a little more time. If you want to keep your faculty around, you've got to show them you care:

1. Attempt to get the best possible wages and benefits for them (if possible a slight raise - say $1000 over the scale - can do wonders for your staff).

2. Do not be so picky about sick leave. Occassionally let your teachers take a mental health day. You'll reap the benefits from a rested teacher.

3. Provide Professional Development Funds for their academic growth. We can't pay them peanuts and then expect them to go on and do graduate work without some financial assistance.

4. Make sure they have a real faculty room - most faculty rooms I see are a disgrace!

5. This is the most important - show them how pleased you are with them - recommend your teachers for Accreditation Committees, in-service presentations, reviewers for new texts- anything that will add to their professional reputation.

6. Letters of appreciation - always make the faculty feel that they are the most important people in the world.

Our goal - keep these people as valued employees.

Keeping the Principal - In 1978 the school I went to - I made a deal to stay 3 years. The pastor knew he needed a "hook". He took $15,000 and paid for my doctorate degree at University of San Francisco, provided a room at the rectory for me for late nights, provided dinners and regularly he would take me to lunch. He would let me know that I was somebody. It worked and I stayed 9 years.

4. Curriculum

It is the meat of your whole program - it is what you teach, how you teach it, and how the students learn it.

For your document -

1. State what you are doing - how you analyze it and update it. Include all assumptions for purchase and replacement of texts, equipment, etc.

- Stay away from the scope and sequence of textbooks. Do not let a textbook determine what is being taught in your school.

- Examine each subject, determine what should be taught, when it should be introduced, re-inforced, and mastered. Over the span of two years each subject should be brought for intense analysis.

Immediate effects of a solid curriculum is a full school and large waiting list.

5. Plant Needs

Document -

- List exactly what needs to be done to upgrade and improve your school.

- Put in the dreams items that would make it all it can be.

- Make sure you list the capital improvements that would live up to your philosophy, enrollment, and curriculum needs.

For action -

- Tell everyone exactly what you want and need.

- Know your important community leaders (for Public Relations)

6. Finance

Document -

Develop an expenditure budget based on enrollment, staffing, and curriculum assumption for 5 years. Review costs for previous years. Develop a plan for getting the income needed.

Action -

You have to budget carefully. Avoid surprises. You must extend the pie besides tuition and fund raisers. (e.g. Memorial Fund - people donate to the school in memory of a loved one. Another is the added voluntary tuition - you put the exact per pupil cost down, 1 child, 2, 3, and 4 children, ask those who can to pay the true cost. Make a list of what you need. Make people know what you need. Any time you can get anything free, more monies for you.

How to budget -

Getting a true per pupil cost and planning for it.

- Alternate sources:

a. Memorial Fund

b. Tuition Assistance Program

c. Added Voluntary Tuition

d. Free Stuff, e.g. furniture, office supplies, etc.

e. Improved Tuition Procedures

Year round collection
Stay on top of people who pay tuition late.
Follow up with phone calls and letters.

f. Development

1. Grants - a wrong way to request for grants is writing letters. Use long range plan and contact people to get grants. Grant money comes from people who know you.

2. Annual giving - once a year to the whole community.

3. Deferred giving - from families who have lost a loved one and would like to donate to the school.

4. Endowments - some people would like to donate to the school. e.g. Science lab, Language program, etc.

7. Particular School Goals

What is your particular need that you should address? What do you need to accomplish?

Here are some examples -

1. Catholic Identity - with all lay staff, is this a problem?

2. Parish Feeder - what type of relationship does your school and parish have? You must have a better relationship between the school and parish. You must be friends before you can talk money.

Time Management -

As an administrator - there is so much to do - don't let long range planning be at the bottom of your list.

Recently I left a very successful school after 9 years. Once again, I had to start at the beginning. Basically, I've brought my vision of Catholic education to St. Joseph's. I continually have to look at my notes and remind myself that long range planning is a document and a way of acting. It's worked in the past and it'll work for me again. Already since June we have added to the enrollment, scheduled a complete overhaul of the plant, tightened the budget, and added additional types of funding. It works - I guarantee it.